

Module B:

Issuing

Food Instruments

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OVERVIEW

Introduction

This module will help the Trainee understand how WIC issues Food Instruments (FIs).

Learning Objectives

After completing this module the Trainee will be able to demonstrate the following steps involved with FIs.

- Show how to print, verify and distribute FIs
 - Describe the procedure for single, double, and triple issuance of FIs
 - Describe how to void an FI
 - Describe how to change a food package
 - Describe how to maintain checkstock security
 - Show how to load checkstock, change the printer ribbon, and clear paper jams
-

HOW TO ISSUE FIs

Definition

Issuing FIs is:

- printing and distributing FIs to the participant
-

Supplies for Issuing FIs

You will need the following to issue FIs:

- a box of checkstock the State WIC Program has given your local agency
 - an WIC MIS computer terminal
 - a voucher printer
 - a *WIC Food Issuance Signature Log*
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Printing & Distributing FIs

The charts on the next two pages show you how to:

- print FIs
 - distribute (give) FIs
-

Learning Activity 1

To learn more about *Issuing FIs*, you may want to try **Learning Activity 1** found at the end of this module.

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HOW TO ISSUE FIs *(continued)*

Printing FIs

1	Setup the printer and the WIC MIS computer you will use.
2	Go to the <i>Logon to Printer</i> screen in WIC MIS.
**3	Select the printer you will be using by entering a “c” (connect).
**4	Enter the checkstock box number.
**5	Enter the serial number of the first check available in the box.
**6	Load the checkstock in the printer.
7	Again select the printer you will be using by entering an “s” (select).
8	Verify serial numbers: Make sure the serial number of the first check you will be printing matches the serial number on the computer screen.
9	Print a test check.
10	Verify serial numbers: Again compare serial numbers. Make sure the serial number on the checks matches the <i>WIC Food Issuance Signature Log</i> for the specific participant.
11	Print the FIs for the family name you want to print.
12	Prepare <i>WIC Food Issuance Signature Log</i> for participant to sign.

****** *These steps are NOT necessary if the checkstock has already been put into the printer.*

HOW TO ISSUE FIs *(continued)*

Distributing FIs ***

1. Check identification of participant.

- Ask for the participant's WIC Identification Folder (WIF).
- If the participant has forgotten the WIF, you may accept another form of photo identification.
- If the participant has lost the WIF, check photo identification and issue another WIF.
- If the participant has sent an alternate, make sure she/he has the WIF, has signed it, and has photo identification.
- If the participant has sent a proxy, make sure she/he has the WIF, with a permission slip from the participant, and a photo identification.

2. Check the FI is correct.

- Make sure printed serial number matches the number on WIC MIS screen.
- Make sure participant's name is spelled correctly.
- Make sure all the foods listed are correct.

3. Review the FIs with participant

- Show the participant the range of checks they are receiving.

4. Have participant or alternate sign the *WIC Food Issuance Signature Log*.

- Make sure participant's name is correctly entered and matches the name on the FIs.
- Have participant or alternate sign the line(s) next to the serial number(s) of the FIs s/he receives.
- Compare the signature on the WIF with the signature on the log, do they match?

Special Circumstances

Mailing FIs

Local agencies are permitted to mail FIs if the participant does not have an alternate who can pick up the FIs and:

- Is ill, including hospitalization of the participant after delivery
- Is caring for an ill family member
- Does not have access to transportation
- Is unable to travel safely due to severe weather or disaster
- Is unable to receive FIs because WIC MIS is not available

***Note: Your local agency may issue FIs differently.

SINGLE, DOUBLE, AND TRIPLE ISSUANCE OF FIs

Frequency of Distribution	A participant may get FIs for 1, 2 or 3 months depending on her/his category and the local agency's policy.
Single Issuance	Single issuance is printing and giving FIs to the participant for the current month (1-month supply of supplemental foods).
Double Issuance	<p>Double issuance is printing and giving FIs so the participant gets a food package for the current month and for the next month.</p> <p>Participants cannot use the FIs for the next month until the "FIRST DAY TO USE" date printed on the food instrument.</p>
Triple Issuance	Triple issuance is printing and giving the participant FIs so the participant gets food packages for 3 months . Triple issued FIs can only be used between the "FIRST DAY TO USE" and "LAST DAY TO USE" dates.
Learning Activity 2	Learning Activity 2: <i>Single, Double & Triple Issuance</i> , found at the end of this module can help you learn more about how your local agency singl, double and triple issues FIs.

VOIDING FIs

Definition

Voiding a FI is marking it not usable or “VOID”.

Two Types of Voids

There are two types of voids:

- Void no reissue
- Void with reissue

Void without Reissue

You will use “void no reissue” when you want to void a FI, but do not want to reissue it. You will use this option when FIs:

- Are issued in error
- Are missing or stolen

Void with Reissue

You will use “void with reissue” when you want to void a FI and also want to reissue it. You will use this option when:

- FIs are damaged
- FI serial numbers do not match
- An individual transfers from one family to another family
- Participant requests a change in already issued food package (For example, from regular milk to lactose free milk)

Voiding FIs

Voiding FIs includes:

- Writing “VOID” on the unusable FIs
- Processing the void in WIC MIS by entering the appropriate ‘reason’ code

Void Codes

You will enter a void code in WIC MIS each time you void a FI. The void codes are listed below.

Description of Void	Code
No Reissue	
Issued in error or no longer wanted	VN
Missing or stolen & a police report filed	VM
Moved out of state	VO
Void Reissue	
Damaged or serial numbers do not match	VD
Individual transfers into another family	VF

Storing Voided FIs

Store voided FIs in a secure location away from participants per local agency guidelines.

Learning Activity 3

Learning Activity 3: *Voiding FIs*, found at the end of this module can help you learn more about how FIs are voided at your local agency.

CHANGING PREVIOUSLY ISSUED FOOD PACKAGES

Changing FIs

Sometimes WIC staff will need to change previously issued FIs.

Examples

Some examples for changing previously issued FIs are listed below.

- A participant needs a different formula type
 - A participant wants to change from regular milk to soy
-

How to Change Issued Food Packages

To change issued food packages in WIC MIS, you will usually go through two steps:

1. Change prescription
2. Change issued food packages

Change prescription is only needed when there are more months left in the certification period for which the change applies. (If participant requests a permanent change.)

Learning Activity 4

To learn more about *Changing Previously Issued Food Packages*, you may want to try **Learning Activity 4** found at the end of this module.

MAINTAINING CHECKSTOCK SECURITY

Checkstock Security

The WIC checks resemble bank checks.

Your agency is responsible for them and must ensure they do not become lost or stolen.

Physical Security

Physical security means the safe keeping of WIC checkstock boxes.

Electronic Security

Electronic security means entering the checkstock into WIC MIS.

Only authorized WIC staff maintain checkstock inventory. Check to see who does this at your agency.

How to Maintain Security

The chart on the next page lists ways to maintain checkstock security.

Each local agency has its own way of maintaining security. Check with your local agency to see how checkstock is handled.

Learning Activity 5

To learn more about *Checkstock Security*, you may want to try **Learning Activity 5** found at the end of this module.

MAINTAINING CHECKSTOCK SECURITY *(continued)*

How to Maintain Checkstock Security

Receiving Checkstock	<ul style="list-style-type: none">• Only authorized staff will complete the following procedures.• Checkstock boxes are compared to the packing slip.• If there are any mistakes, the supervisor and/or the State WIC Program will be contacted.• The person who receives checkstock physically will NOT be the same person who receives checkstock electronically.
Storing Checkstock	<ul style="list-style-type: none">• Store checkstock in a secure, locked area.• Limit access to authorized staff only.• Keep a checkstock inventory log (optional).
Transporting Checkstock	<ul style="list-style-type: none">• Use containers with locks to move checkstock from main office to other agency sites.
Issuing FIs	<ul style="list-style-type: none">• Do not leave checkstock unattended. Keep it away from participants, children and all other unauthorized persons.• At the end of the day or a work session, lock up checkstock and disconnect it in WIC MIS.• Make sure the person who sends food packages to print is NOT the same person who prints the FIs.
Recording Voided FIs	<ul style="list-style-type: none">• Authorized staff will ensure serial numbers of voided FIs match serial numbers appearing on the <i>Daily Voided FIs Report</i>.

LOADING CHECKSTOCK, CHANGING THE PRINTER RIBBON & CLEARING PAPER JAMS

Printer Skills

You will need to know how to use the printer for printing FIs. You will need to know how to the following procedures.

- Load checkstock
- Change the printer ribbon
- Clear paper jams

Printer manual

Ask your mentor/supervisor for detailed instructions on how to work with the printer(s) at your agency.

Learning Activity 6

To learn more about *Using The Printer*, you may want to try **Learning Activity 6** found at the end of this module.

PROGRESS CHECK

1. Put a check mark (✓) next to the supplies you will need to issue FIs.

_____ Cash register	_____ Copy machine
_____ Participant ID	_____ Box of checkstock
_____ Computer printer	_____ WIC MIS computer terminal
_____ Fax machine	_____ WIC Food Issuance Signature Log

2. Number the steps a WIC staff person would go through to print a FI when **checkstock is already in the printer**. Order them from 1 to 5.

_____ Go to the *Logon to Printer* screen in WIC MIS

_____ Check serial numbers of checkstock in printer with numbers on WIC MIS screen

_____ Select the printer to be used by entering "s" in WIC MIS

_____ Print a test check and check serial numbers again

_____ Print FI for the family name you want

3. List three reasons a WIC staff person might mail FIs to a participant:

4. Fill in the blanks with the correct numbers.

A participant who is **single-issued** FIs receives

_____ Month(s) of FIs for him/herself and returns in

_____ Month(s) for her/his next WIC appointment.

A participant who is **triple-issued** FIs receives

_____ Month(s) of FIs for him/herself and returns in

_____ Month(s) for her/his next WIC appointment.

PROGRESS CHECK *(continued)*

5. For each of the types of void situations listed below, mark “R” for void and reissue and “NR” for void and no reissue.

_____ FI was stolen
_____ FI issued in error
_____ Serial number of FI does not match WIC MIS screen
_____ FI was damaged

6. Mark with a check (✓) when a WIC staff person would change a food package.

_____ A breastfeeding participant wants to give her infant formula part of the time.
_____ A participant wants more juice and less cereal.
_____ A pregnant woman wants soy instead of regular milk.
_____ A participant wants yogurt instead of milk.

7. Mark the following as “TRUE” or “FALSE”.

_____ It is best to transport checkstock in a locked container.
_____ Do not leave checkstock unattended.
_____ Store checkstock in a secure, locked area.
_____ At the end of the day or work session, lock up checkstock and disconnect it in WIC MIS.

LEARNING ACTIVITIES

The following activities are included and are recommended for interactive learning:

- **Learning Activity 1:** Issuing FIs
- **Learning Activity 2:** Single, Double & Triple Issuance
- **Learning Activity 3:** Voiding FIs
- **Learning Activity 4:** Changing Previously Issued FIs
- **Learning Activity 5:** Checkstock Security
- **Learning Activity 6:** Using the Printer

ACTIVITY 1: ISSUING FIs

Learning Objectives

After completing this activity the Trainee will be able to show how to print, verify accuracy of, and distribute FIs.

Instructions

1. Arrange to observe a co-worker issue FIs to a participant.
 2. Use the check off list on the next page to write down your observations.
 3. Talk to your mentor or supervisor to discuss your observations.
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ACTIVITY 1: ISSUING FIs

Item (Note: these may vary depending on your agency)	✓
<i>Was the printer & computer set up?</i>	
<i>Was the checkstock already in the printer?</i>	
<i>Was the printer selected?</i>	
<i>Was the serial number of the first check entered?</i>	
<i>Were the serial numbers checked for accuracy (Did the numbers on the checkstock match the numbers on the WIC MIS screen?)</i>	
<i>Was a test check printed? If so, was it voided and recorded on the WIC Food Issuance Signature Log?</i>	
<i>Did the participant or alternate show identification?</i>	
<i>Was the FI checked for correctness (i.e., Is the participant's name spelled correctly)?</i>	
<i>Were the correct serial numbers marked off on the WIC Food Issuance Signature Log?</i>	
<i>Did the participant or alternate sign the WIC Food Issuance Signature Log?</i>	
<i>Did staff compare the participant's signature on their WIF to the WIC Food Issuance Signature Log?</i>	
<i>Did staff review the FIs with the participant?</i>	
<i>Comments:</i>	

ACTIVITY 2: SINGLE, DOUBLE & TRIPLE ISSUANCE**Learning Objectives**

After completing this activity the Trainee will be able to describe how to single, double, or triple issue FIs.

Instructions

1. Ask your mentor or supervisor for the written policies your agency has on single, double or triple issuing FIs. Refer to WPM 330-10.
 2. Read over these procedures.
 3. Talk with your mentor or supervisor about the procedures.
 4. Make sure you understand these procedures.
 5. Explain the procedure for single, double and triple issuance to your mentor or supervisor.
-

ACTIVITY 3: VOIDING FIs

Learning Objectives

After completing this activity the Trainee will be able to void a FI.

Background

Voiding a FI is making it not usable or “VOID”.

There are 2 types of voids:

- Void without reissue
 - Void with reissue
-

Instructions

1. Observe a co-worker when she/he is voiding a FI.
 2. Write down your notes on the next pages. Circle which void type you will be observing.
 3. Make sure s/he explains each step of the voiding process.
 4. Discuss your observations with your mentor or supervisor to make sure you understand how to correctly void FIs.
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ACTIVITY 3: VOIDING FIS**VOID WITH REISSUE or VOID WITHOUT REISSUE**

Step	WIC MIS Screen that appears	What to Do

ACTIVITY 4: CHANGING PREVIOUSLY ISSUED FOOD PACKAGES**Learning Objectives**

After completing this activity the Trainee will be able to describe how to change an issued food package.

Instructions

1. Ask a co-worker to show you how she/he changes an issued food package.
 2. Write down your notes on the next page.
 3. Discuss any questions you may have with your co-worker, mentor, or supervisor.
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ACTIVITY 4: CHANGING PREVIOUSLY ISSUED FOOD PACKAGES

Step	WIC MIS Screen that Appears	What to Do

ACTIVITY 5: CHECKSTOCK SECURITY

Learning Objectives

After completing this activity the Trainee will be able to describe how to maintain checkstock security.

Instructions

1. Ask your mentor or supervisor to show you how your local agency maintains checkstock security.
 2. Write down your notes on the next page.
 3. Discuss any questions you may have with your mentor or supervisor.
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ACTIVITY 5: CHECKSTOCK SECURITY *(continued)***Notes:****Storing Checkstock:****Transporting Checkstock:****Issuing Fls:****Additional Notes:**

ACTIVITY 6: USING THE PRINTER

Learning Objectives

After completing this activity the Trainee will be able to:

- Load FI check paper
- Change the printer ribbon
- Clear paper jams

Instructions

1. Ask a co-worker, your mentor or supervisor to show you how to load paper, change the printer ribbon, and clear paper jams.
 2. Now, ask your co-worker, mentor, or supervisor to watch you as you load paper, change the printer ribbon, and clear paper jams. Do this several times until you feel comfortable using the printer.
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PROGRESS CHECK

1. Put a check mark (✓) next to the supplies you will need to issue FIs.

<input type="checkbox"/>	Cash register	<input type="checkbox"/>	Copy machine
<input checked="" type="checkbox"/>	Participant ID	<input checked="" type="checkbox"/>	Box of checkstock
<input checked="" type="checkbox"/>	Computer printer	<input checked="" type="checkbox"/>	WIC MIS computer terminal
<input type="checkbox"/>	Fax machine	<input checked="" type="checkbox"/>	WIC Food Issuance Signature Log

2. Number the steps a WIC staff person would go through to print a FI when **checkstock is already in the printer**. Order them from 1 to 5.

- 1 Go to the *Logon to Printer* screen in WIC MIS
- 3 Check serial numbers of checkstock in printer with numbers on WIC MIS screen
- 2 Select the printer to be used by entering "s" in WIC MIS
- 4 Print a test check and check serial numbers again
- 5 Print FI for the family name you want

3. List three reasons a WIC staff person might mail FIs to a participant:

ANSWERS MIGHT INCLUDE ANY 3 OF THE FOLLOWING:

- ***Participant is ill/hospitalized and cannot come to clinic and does not have an alternate.***
- ***Participant or alternate do not have access to transportation.***
- ***WIC MIS is down.***
- ***Bad weather makes it hard for the participant to travel.***

4. Fill in the blanks with the correct numbers.

A participant who is **single-issued** FIs receives

- 1 Month(s) of FIs for him/herself and returns in
- 1 Month(s) for her/his next WIC appointment.

A participant who is **triple-issued** FIs receives

- 3 Month(s) of FIs for him/herself and returns in
- 3 Month(s) for her/his next WIC appointment.

PROGRESS CHECK *(continued)*

5. For each of the types of void situations listed below, mark “R” for void and reissue and “NR” for void and no reissue.

NR FI was stolen

NR FI issued in error

R Serial number of FI does not match WIC MIS screen

R FI was damaged

6. Mark with a check (✓) when a WIC staff person would change a food package.

✓ A breastfeeding participant wants to give her infant formula part of the time.

 A participant wants more juice and less cereal..

✓ A pregnant woman wants soy instead of regular milk

 A participant wants yogurt instead of milk.

7. Mark the following as “TRUE” or “FALSE”.

TRUE It is best to transport checkstock in a locked container.

TRUE Do not leave checkstock unattended.

TRUE Store checkstock in a secure, locked area.

TRUE At the end of the day or work session, lock up checkstock and disconnect it in WIC MIS.